

Daily Dossier

May 04, 2021

Domestic Equity (% Change)

Index	1 Day	1 Week	1 Year
S&P BSE Sensex	-0.13	0.69	44.49
S&P BSE 100	0.04	1.15	49.13
S&P BSE 200	0.12	1.26	52.32
Nifty 50	0.02	1.03	48.42
Nifty 100	0.14	1.13	48.01
Nifty 200	0.16	1.30	51.34

Returns less than 1 year are absolute and greater than 1 year are compounded annualized

Domestic Fixed Income (% Change)

Index	1 Day	1 Week	1 Year
ICRA Composite Gilt Index	24.09	14.11	6.37
ICRA Liquid Index	3.57	3.31	3.71
ICRA Composite Bond Fund Index	34.13	12.98	8.65
ICRA Composite AAA Corporate Bond Index	47.85	11.91	11.50

Returns less than 1 year are simple annualised and greater than 1 year are compounded annualized

Currency Data (RBI Reference Rate)

Index	3-May-21	26-Apr-21	1-May-20
INR / USD	74.18	74.77	75.12
INR / EUR	89.17	90.51	81.62
INR / GBP	102.50	103.95	93.59
INR / 100 Yen	67.70	69.34	70.48

^[1]Data as on 30 Apr, 2021

Global Equity (% Change)

Index	1 Day	1 Week	1 Year
Nasdaq Composite	-0.48	-1.72	61.48
Nikkei ^[1]	-0.83	-1.08	46.86
FTSE ^[1]	0.12	0.10	20.94
SSE Composite Index ^[1]	-0.81	0.17	20.52
KOSPI	-0.66	-2.81	60.57
HangSeng	-1.28	-2.06	15.07

Returns less than 1 year are absolute and greater than 1 year are compounded annualized

Domestic Commodity (% Change)

Index	1 Day	1 Week	1 Year
Crude Oil (1 bbl)	1.89	3.21	238.37
Gold (10 gm)	0.00	0.00	16.05
Silver (1 kg)	0.00	0.00	89.51
Aluminium (1 kg)	1.50	4.95	47.27

Returns are absolute

Key Economic Indicators (In %)

Index	Latest	Previous
WPI (Mar'21)	7.39	4.17
CPI (Mar'21)	5.52	5.03
IIP (Feb'21)	-3.60	-0.90
GDP (Q3 FY'21)	0.40	-7.50



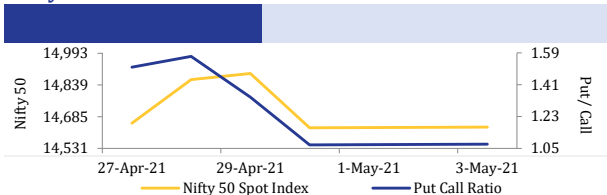
Quote of the day

"Buy not on optimism, but on arithmetic." - Benjamin Graham (Economist, Investor)



Equity

Nifty 50 and Put Call Ratio Movement



Advance Decline Ratio

	NSE	BSE
Advance	1,162	1,779
Decline	788	1,258
Unchanged	109	177

Institutional Flow - Equity (₹ Cr.)

	Purchase	Sales	Net
FII Flows	8,511	11,662	-3,151
MF Flows**	96	184	-88
DII Flows	4,366	3,813	553

** Data as on Apr 29, 2021

Institutional Flow - Debt (₹ Cr.)

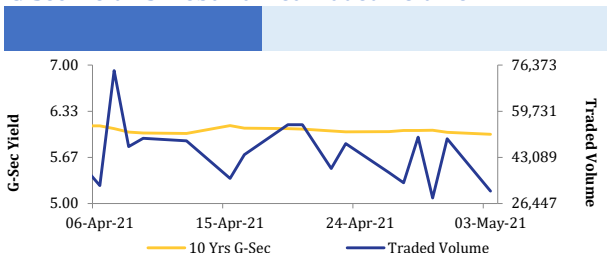
	Purchase	Sales	Net
FII Flows	665	1,570	-905
MF Flows**	153	50	103

- Indian equity markets closed on a flattish note with Sensex dipping marginally as investors are contemplating on growing probability of government imposing curbs at the national level to rein in the COVID-19 spread.
- Key benchmark indices S&P BSE Sensex lost 0.13% and Nifty 50 gained 0.02% to close at 48,718.52 and 14,634.15 respectively.
- The overall market breadth on BSE was strong with 1,779 scrips advancing and 1,258 scrips declining. A total of 177 scrips remained unchanged.



Debt

G-Sec Yield Vs. Debt Market Traded Volume



Liquidity Indicators (₹ Cr.)

	3-May-21	30-Apr-21	1-May-20
G-Sec	26,165	44,823	35,084
LAF ^[1]	-419,013	-430,126	-748,828
T-Bill	1,858	2,767	7,907
Call	11,480	10,580	14,265
T-Repo	270,215	291,346	2,274

Policy Rates (in %)

	3-May-21	26-Apr-21	1-May-20
Reverse Repo	3.35	3.35	3.75
Repo	4.00	4.00	4.40
CRR	3.50	3.50	3.00
SLR	18.00	18.00	18.00
Bank Rate	4.25	4.25	4.65

Top 5 traded G - Sec(03 May 2021)

Security	Volume (Rs. Cr.)	Closing Yield	Change in BPS
05.85 GS 2030	11,865	6.00	-3
06.64 GS 2035	2,216	6.63	-1
06.76 GS 2061	1,785	6.79	0
07.32 GS 2024	1,075	4.76	-1
07.72 GS 2025	826	5.50	-1

- Bond yields fell on hopes that the Reserve Bank of India (RBI) would purchase government securities which will provide support to the domestic debt market sentiment.
- Yield on the 10-year benchmark paper (5.85% GS 2030) fell 3 bps to close at 6.00% as compared to the previous close of 6.03% after moving in a range of 6.00% to 6.02%.

^[1]Data as on 30 Apr, 2021

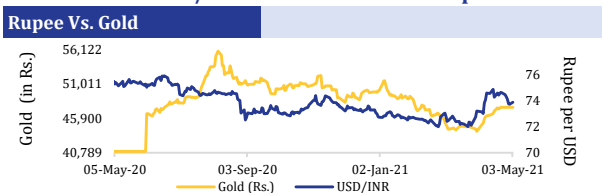


Commodity and Currency

Global Commodity

Category	Current	Prev Day	% Change
Gold (\$/oz)	1,792.36	1,768.59	1.34
Silver (\$/oz)	26.87	25.90	3.75
NYMEX Crude(\$/bbl)	64.41	63.45	1.51
Brent Crude(\$/bbl) ^[1]	68.33	68.59	-0.38
Baltic Dry Index ^[1]	3,053.00	3,007.00	1.53

Movement of USD/INR with Domestic Gold prices



- Gold prices rose after data showed that U.S. manufacturing activity grew at a slower pace in Apr 2021 and following decline in U.S. Treasury yields.
- The Indian rupee rose against the greenback following selling of the greenback by exporters. Inflows related to an initial public offering added to the gains.



Mutual Fund

Equity

Category	1 Year	3 Years	5 Years
Large Cap Fund	43.99	9.84	12.60
Mid Cap Fund	67.46	10.26	14.82
Multi Cap Fund	57.53	10.70	13.98
Aggressive Hybrid Fund	39.77	9.08	11.63
Small Cap Fund	92.70	9.14	15.38

Debt

Category	1 Month	6 Months	1 Year
Liquid Fund	3.13	3.09	3.31
Ultra Short Duration Fund	3.98	3.50	4.63
Short Duration Fund	8.55	4.32	7.93
Long Duration Fund	9.30	1.82	5.64
Gilt Fund	10.52	2.03	5.20

Note:

1. Equity: Less than 1 year return are absolute and greater than 1 year returns are CAGR;
2. Debt: Less than 1 year return are simple annualised and greater than 1 year returns are CAGR;
3. Category as per MFI Explorer

- Mutual funds bought equity worth Rs. 95.84 crore as against sale of Rs. 183.50 crore as on Apr 29, 2021. This led to a net sale of Rs. 87.66 crore compared with a net purchase of Rs. 574.53 crore on Apr 28, 2021.
- Mutual funds bought debt worth Rs. 153.30 crore as against sale of Rs. 49.87 crore as on Apr 29, 2021. This led to a net purchase of Rs. 103.43 crore compared with a net purchase of Rs. 960.18 crore on Apr 28, 2021.



Event Calendar

Events for May 2021

Event	Date	Event	Date
Forex Reserves	7-May-21	CPI Inflation (Apr 2021)	12-May-21
Credit Growth	7-May-21	WPI Inflation (Apr 2021)	14-May-21
Deposit Growth	7-May-21	Infrastructure Output	31-May-21
Index of Industrial Production (Mar 2021)	12-May-21	Fiscal deficit (as a % of budget estimates)	31-May-21

Note: All the data of the newsletter are sourced from MFI Explorer, BSE, CCIL, MCX, NSDL, NSE, RBI, SEBI, Refinitiv

^[1]Data as on 30 Apr, 2021

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